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NATIONAL BROILER MARKET AT-A-GLANCE



Majority prices were unchanged when compared to a week earlier. Trade sentiment was fully steady to firm in the West, steady in the Midwest and about steady in the Northeast. Retail demand was slow to fair with limited buyer interest. Food service ranged slow to fairly good with best movement into fast food. Supplies were generally sufficient for current trade needs. In the parts structure, trading was light and selective. Dark meat was sufficient with thighs slightly more available, breast items ranged adequate to available. Wings were at least adequate and competitively priced in some instances to stimulate additional interest. In production areas, live supplies were moderate. Weights were desirable to light, mostly desirable.

Preliminary report of prices negotiated for trucklot sales of ready-to-cook broiler/fryers fob and delivered to first receivers at major market areas week of 07/21/03-07/25/03 (cents per lb)

US GRADE A

(Including branded product)

AREAS	MAJORITY	RANGE	WTD AVG	LOADS
Delivered to First Receivers				
Chicago	52.00-55.00	52.00-64.00	55.13	24
Los Angeles	73.00			
New York	58.00-61.00			
Southeast Area FOB Dock Equivalent				
Mississippi	67.00-68.50	49.00-70.00	67.21	82

GEORGIA F.O.B. DOCK PRICES Georgia f.o.b. dock quoted price on broilers/fryers for this week's trading is 67.50 cents based on ice-packed USDA grade "A" sized 2 1/2 to 3 pound birds.

PRELIMINARY FOB DOCK OR EQUIVALENT

LOADS	RANGE	FRIDAY PRELIM. WTD. AVG.
863	60.20-69.27	67.23

Georgia f.o.b. dock confirmed preliminary weighted average price on ice packed parts:

ITEM	WTD. AVG. (CENTS PER POUND)	VOLUME (000 POUNDS)
LINE RUN TENDERS	202.50	1,264
BREASTS - B/S	194.00	5,057
BREASTS - WHOLE	102.00	1,773
THIGH MEAT - B/S	75.50	918
LEG QUARTERS	30.50	8,446
WINGS	71.50	2,974

THIS INFORMATION IS SUPPLIED BY THE GEORGIA DEPARTMENT OF AGRICULTURE'S POULTRY MARKET NEWS SERVICE.

MIDWEST REGION BROILER/FRYERS Preliminary majority prices into Chicago were unchanged from Monday's final majority prices. Whole fryer trade sentiment was generally steady. Offerings of additional whole fryers were adequate for buyer's current needs. Retail movement was slow to only fair with scattered features attracting some additional activity. Food service trade remained irregular, light to moderate, best into fast food outlets. Floor stocks were cleared to adequate with some buyers reducing volumes on incoming loads. Weights desirable. Supplies of bone in breasts and wings, especially heavy weights, adequate to instances ample, boneless skinless breast and dark meat items adequate. The market tone was mostly steady on all parts items.

SOUTHERN BROILER Trade sentiment was mostly steady. Demand entering the weekend ranged light to moderate, best where retail ads and fast food promotions were in progress. Supplies of all sizes were usually sufficient to satisfy current trade needs. In the parts structure, movement was fair with leg and leg quarters in good balance to close and clearing satisfactorily. Breast items were in better balance than earlier in the week and ranged adequate to available. Wings and thighs were at least adequate with mixed interest. In production areas, live supplies were moderate at mostly desirable weights.

WESTERN REGION BROILER/FRYERS The market tone was fully steady to firm with preliminary majority prices for next week 1 cent higher than last Fridays' level. Lightweight sized whole body product was confidently held and in fair balance with current needs, heavier

weight product readily available. Reported buying activity had improved. Retailer demand was generally good, best to cover promotions. Dealers anticipated fairly good weekend clearances.

Ads noted (per pound unless otherwise stated):

Arizona—whole body 139 [buy one get one free], cornish hen 179, cornish hen 18 ounce 250, boneless breast 188-299, boneless breast 4# bag IQF 752, breast tenders 169-349, split breast 88, leg quarter 99, wing 89, thigh 89-99, thigh 4# bag IQF 300, drumstick 89-99, drumstick 4# bag IQF 300;

Colorado—whole body 79, boneless breast marinated 399, boneless breast 299, boneless breast 4# bag IQF 999, split breast 149-259, (food service deli section fried—drumstick and thigh 10 piece 429, 50 piece 1746, 100 piece 3441, 250 piece 8226, 500 piece 15999; mixed 8 piece 499, 50 piece 2499, 100 piece 4899, 250 piece 11899, 500 piece 23499);

Northern California—whole body free range 179, whole cut-up 139, Cornish hen 199, boneless breast marinated 499, boneless breast 299, boneless breast fillets 299, boneless thigh meat 199, thigh 99, drumstick 99;

Southern California—whole body 57-119, whole cut-up 119, Cornish hen marinated 199, boneless breast 187-498, boneless breast seasoned 599, thin sliced boneless breast 498, boneless thigh meat 187, boneless leg meat 98, boneless leg meat marinated 199, whole leg 69, wing 5# bag IQF 699, wing 2.5# bag IQF 198, leg quarter 69-77, leg quarter marinated 99, leg quarter seasoned 77, leg quarter 10# bag 390, thigh 37-147, thigh 4# IQF 250-319, drumstick 37-147, drumstick 4# IQF 250-319, drumstick 10# bag 390, (food service deli section fried—drumstick and thigh 8 piece 298; mixed 8 piece 399-499).

NORTHEAST BROILER/FRYERS Prices were unchanged, however asking prices for next week were trending slightly higher on the larger sizes. The market tone was steady to fully steady entering the weekend. Demand was moderate to good. Supplies were adequate to instances available for current trade needs. Breaking stock offerings were usually sufficient for the moderate to fairly good demand. Light type fowl were at least adequate to fully adequate for the mostly light to no better than fair demand. Processing schedules for the upcoming week were reported as normal to instances heavy.

DELMARVA BROILER/FRYERS Movement of ready-to-cook whole birds good on generally well cleared supply of 3.5 and 4.0 pound sizes; light to fair on the 2.5 and 3.0 pound sizes. Live supplies moderate; weights often lighter than desired. Processor schedules moderate. Less than trucklot asking prices unchanged at 59 to 68 cents. Trade sentiment fully steady to firm on the larger sizes, barely steady on the smaller. Boneless/skinless and bone-in breasts generally noted as in better balance. Leg items adequate and clearing satisfactorily with thighs in the longer position and drums the tighter. Wings fully adequate.

*BROILER/FRYER CURRENT NEGOTIATED PRICES FOR IMMEDIATE DELIVERY INCLUDES MOSTLY MULTIPLE-DROP SHIPMENTS OF BRANDED AND WING TAGGED TO NEW YORK CITY FROM DELMARVA. **BRANDED U.S. GRADE A**

RANGE	55-71
WEIGHTED AVERAGE	61.46
NO. OF BOXES	8,693
CUMULATIVE	61.95
	07/14/03-07/18/03
	07/15/02-07/19/02
NO. OF BOXES	42,651
	07/14/03-07/18/03
	07/15/02-07/19/02
	43,091

*8 of 8 plants reporting.

JULY 17					SOUTHERN STATES BROILER/FRYER PARTS					JULY 18	
ITEM	POUNDS		MAJORITY	WTD AVG	POUNDS	WTD		WTD AVG	WEEKLY	WTD AVG	
	(000)	RANGE				(000)	RANGE				
BREAST - B/S	887	150.00-234.00	150-154	160.16	870	152.00-234.00	154-157	161.55	4,427	159.70	
TENDERLOINS	155	135.00-211.00	137-141	151.79	197	135.00-211.00	135-140	148.92	1,053	153.93	
BREAST - LINE RUN	96	88.00-109.00	89-92	92.10	106	89.00-109.00	90-92	92.61	425	93.63	
FRONT HALVES	TOO FEW TO REPORT				TOO FEW TO REPORT				320	80.30	
LEGS	128	29.00-47.00	30-32	32.00	114	29.00-47.00	30-32	32.50	521	32.85	
LEG QUARTERS (BULK)	595	24.00-27.00	24-25	24.95	605	23.00-29.00	24-25	24.53	3,028	24.52	
LEG QUARTERS (4/10)	1,008	25.00-33.00	26-28	27.20	868	25.00-33.00	27-29	26.98	4,712	27.67	
WINGS (WHOLE)	276	54.00-76.50	-	72.53	276	54.00-76.50	-	72.53	1,389	72.33	
WINGS (CUT)	420	71.00-82.00	74-76	75.75	505	71.00-82.00	74-77	76.08	2,270	76.09	
DRUMSTICKS	68	40.00-60.00	-	42.35	68	47.00-60.00	-	48.53	383	46.22	
THIGHS	TOO FEW TO REPORT				TOO FEW TO REPORT				112	47.36	
B/S THIGHS	105	65.00-82.00	-	75.10	95	68.00-82.00	-	76.63	455	75.12	

WHOLE BODY INDEX BASED ON SOUTHERN STATES PARTS					WHOLE BODY INDEX BASED ON SOUTHERN STATES PARTS						
TRADING FOR JULY 17, 2003 F.O.B. DOCK.					TRADING FOR JULY 18, 2003 F.O.B. DOCK.						
	RANGE		AVERAGE			RANGE		AVERAGE		5-DAY AVERAGE	
	50.00 - 54.50		52.39			51.00 - 55.50		52.82		52.43	

The Index is intended solely as an indicator of values for commodity-type product and does not represent industry's willingness to sell or ability to buy.

NORTHEAST BROILER/FRYER PARTS Trucklot buying activity increased slightly and was fair to moderate entering the weekend. Offerings of bone-in breasts were available and boneless-skinless breasts were at least sufficient. Dark meat cuts and wings were adequate to fully adequate. Retail and distributive movement was about fair. The market tone was no better than steady.
ICE PACKED B/F PARTS, DLVRD TO FIRST RECEIVERS IN POOL TRUCKLOT AND TRUCKLOT QUANTITIES, CENTS PER LB.

JULY 17				JULY 18			
ITEM	CURRENT NEG		WTD	WTD	CURRENT NEG		WTD
	TRADING*	AVG**			TRADING*	AVG**	
BREAST - B/S	165	167.66	433,880	165	167.18	596,637	167.61
TENDERLOINS	140	139.87	76,720	140	138.85	131,760	138.60
BREAST - WITH RIBS	85-86	89.41	251,580	84-85	89.55	243,800	89.48
BREAST - LINE RUN	85	87.05	121,840	84	85.64	128,640	86.12
LEGS	37-38	40.22	159,200	37-38	37.61	273,000	37.43
LEG QUARTERS (BULK)	25-26	27.01	482,160	25-26	26.86	483,637	26.96
DRUMSTICKS	33-34	41.25	90,200	33-34	37.64	115,150	39.26
THIGHS	27-28	34.20	103,440	27-28	34.55	99,340	36.28
B/S THIGHS	69-70	73.13	67,240	69-70	74.42	68,680	74.02
WINGS (WHOLE)	62-63	67.67	172,240	62-63	68.93	221,830	67.36
BACKS AND NECKS (STRIPPED)	10-12	12.65	35,440	10-12	12.06	40,920	12.31
LIVERS (5 POUND TUBS)	25-30	27.93	5,400	25-30	26.12	13,880	26.96
GIZZARDS (HEARTS)	35-40	39.77	17,960	35-40	40.02	32,080	40.12

INCLUDES: NY CITY METRO. AREA, RI, NORTHERN NJ, MA, CT, PA (NORTHEAST OF HARRISBURG). * TODAY'S NEG. SALES AS OF 11:30 A.M.

** WTD AVG PRICE OF ALL GRADES AND BRANDS OF PRODUCT SHIPPE, OR TO BE SHIPPED AS OF 1:30 P.M.

ESTIMATED SLAUGHTER OF BROILER-FRYERS (IN THOUSANDS)

	ESTIMATED		ACTUAL		AVG WTS		ACTUAL		AVG WTS	
	07/18	07/17	07/16	07/15	07/16	07/15	07/11	07/09		
ALA	3,954	4,115	3,992	4,123	5.17	5.24	4,391	5.22		
ARK	5,249	5,137	5,133	4,901	4.83	5.02	5,618	4.94		
DELMARVA	2,253	2,249	2,267	2,295	5.26	5.38	2,293	5.28		
KY-LA-TN	2,330	1,956	1,839	1,816	4.73	4.82	2,224	4.82		
MISS	2,714	3,104	2,879	3,068	5.37	5.45	3,095	5.40		
NC	2,960	2,633	2,533	2,659	5.93	5.92	2,916	6.05		
TEXAS	2,457	2,481	2,363	2,510	5.02	5.01	2,465	4.94		
TOTAL	21,917	21,675	21,006	21,203	5.16	5.25	23,002	5.21		

MON-FRI 108,004(A) 108,179(A)

(A) Weekly cumulative for states listed above. Broiler-fryer slaughter under federal inspection for 18-Jul 03 and 19-Jul-03 is estimated to be 32,790 ,000 down 5.00 percent from a week ago and up 1.5 percent from a year ago.

(Last week 34,517,000; last year 32,291,000)

Weekly broiler-fryer slaughter under federal inspection for the week ending 19-Jul-03 is estimated to be 156,146 ,000 head down 2 percent from a week ago, and down 2 percent from a year ago

(Last week 159,849,000 Last year 159,974,000)

SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED POULTRY, DELIVERED TO RETAILERS

	RANGE
FRESH FRYERS	90-96
ROASTERS 4# & UP	80-95
HENS UNDER 5#	
HENS OVER 5#	63
DUCKS	
RABBITS-WHOLE	
RABBITS-CUT UP	

SAN FRANCISCO PROCESSED POULTRY DELIVERED TO RESTAURANTS AND INSTITUTIONS

	RANGE
FRESH FRYERS	106-107
DRY PACK	
ICE PACK	99-101
ROASTERS 4# & UP	113
DRY PACK	
ICE PACK	104-105
HENS OVER 5#	91-98
ICE PACK	
DRY PACK	
DUCKS	155-166

YOUNG CHICKENS SLAUGHTERED Under federal inspection, classified by live wt., week ending 05-Jul-03 (Preliminary),

	(A) Fast food/ Food service	(B) Retail	(C) Deboning
	4.20 Lbs & down	4.21-5.25 Lbs	5.26 Lbs & Up
	-----THOUSANDS-----		

Head	26,710	22,277	39,430
Avg Weight	3.88	4.86	6.05
% of total /1	30%	25%	45%

COMPARISONS

Last week	23,020	19,298	54,183
Avg Weight	3.80	4.78	6.05
% of total /1	24%	20%	56%

Same week, yr ago /2	21,268	16,101	27,627
Avg Weight	3.73	4.89	6.08
% of total /1	33%	25%	43%

To date/2003	665,233	620,373	1,241,451
To date/2002	774,950	652,464	1,247,785

/1 May not total to 100% due to rounding. /2 Comparable week.

(A) This weight class generally denotes chickens marketed in the fast food and food service industries. May also include cornish hens.

(B) This weight class generally denotes chickens marketed in the retail industry.

(C) This weight class generally denotes chickens used in further processing. May also include heavy roasters sold in retail channels.

LIVE POULTRY SLTRD UNDER FEDERAL INSPECTION W/E 12-Jul-03 (PRELIMINARY)

	YOUNG CHICKENS	LIGHT HENS	HEAVY HENS	TOTAL HENS	DUCKS
	-----THOUSANDS-----				
HEAD	159,849	1,153	1,515	2,668	347
AVG WT	5.23	3.74	8.04	6.18	6.68
LAST WEEK	143,589	1,019	1,179	2,198	340
SAME WK YR AGO	158,616	1,498	1,418	2,916	378
AVG WT	5.03	3.39	7.95	5.61	6.44
TO-DATE/2003	4,252,661	45,040	38,006	83,046	11,588
TO-DATE/2002	4,315,575	49,710	37,388	87,098	12,081

The estimated number of fryers available for marketing based on the 2-week revised average chick placements 6 to 7 weeks earlier was 160.4 million head. Estimated U.S. slaughter for this period is 161.8 million head or 1.4 million head more than or 101% of estimated fryers available.

EAST PETERSBURG POULTRY - DATE OF AUCTION: JULY 15, 2003
PRICES PAID PER POUND, EXCEPT AS NOTED

AI PAPERS REQUIRED FOR ALL OUT OF STATE POULTRY

	RANGE	RANGE
Muscovy Ducks - Drakes	.70 - .80	Banty Hens 3.00 - 3.75ea.
Muscovy Ducks - Hens	.70 - .80	Geese
Pekin Ducks	5.00 - 5.25ea.	9-14 LBS .80 - .90
Red Fowl 4-5 LBS	.45 - .60	Pigeons 3.50 - 4.00ea.
Red Fowl 5-6 LBS	.60 - .90	White Pigeons 3.75 - 4.10ea.
Crossbred Fowl 5-9 LBS	.70 - 1.00	Rabbits 4-6 LBS .50 - 1.00
Crossbred		Rabbits 6-9 LBS .60 - .80
Roosters 4-6 LBS	.80 - 1.10	Bunnies .25 - 3.00ea.
Crossbred		Guinea Pigs 5.00 - 8.00ea.
Roosters 7-11 LBS	.50 - .70	Doves 4.00 - 5.00ea.
Guinea Fowl	1.20 - 1.35	
Banty Roosters	5.00 - 6.00ea.	Total Coops Sold 560

EASTERN REGION MISCELLANEOUS POULTRY

FOR CURRENT DELIVERY FOR THE WEEK OF 14-JUL-2003

DUCKLINGS: PRICES NEGOTIATED BY FIRST RECEIVERS, US GRADE A, 4-5 POUNDS, DELIVERED IN TRUCKLOT AND POOL TRUCKLOT QUANTITIES

ORIGIN	FROZEN	FRESH
LONG ISLAND	140	146
MOSTLY		
MIDWEST	124-128	125-130
MOSTLY		

ROASTERS: PRICES NEGOTIATED BY FIRST RECEIVERS, US GRADE A AND PLANT GRADE, 5 POUNDS AND UP, DELIVERED

	RANGE	MOSTLY
ICE PACKED (12 PER BOX)	57-64	61-63
VACUUM PACKED (6-9 PER BOX)	55-86	68-70

SQUABS: NEW YORK AREA WHOLESALE PRICES, FROZEN, PLANT GRADE, DOLLARS PER DOZEN, 1 TO 10 BOXES

12 OZ.	60.48-69.66
14 OZ.	66.96-76.14
16 OZ.	73.44-83.43

THE EASTERN REGION INCLUDES:

CT,DE,FL,GA,MA,MD,ME,NC,NH,NJ,NY,PA RI,SC,VA,VT,WV

CENTRAL REGION DUCKLINGS Prices remain unchanged. Trade sentiment mostly steady. Demand was moderate to at times good, mostly moderate. Weights were desirable. Schedules usually full time. Prices paid to first receivers for 10-18 oz. boneless breast at \$4.25-5.25, bone in legs at \$1.35-1.45, gizzards at \$1.35-1.40, wings at \$0.30-0.45, livers at \$0.75-1.70, and feet at \$0.80-1.15.

NEGOTIATED BY FIRST RECEIVERS FOR US GRADE A DELIVERED IN TRUCKLOT AND POOL TRUCKLOT QUANTITIES, 4-5 POUNDS, WEEK OF 14-JUL-2003

ORIGIN	FROZEN	FRESH
MIDWEST AND OTHERS	107-124	125
MOSTLY		

**ESTIMATED U.S. SLAUGHTER COMPARED TO
ESTIMATED FRYERS AVAILABLE FOR MARKETING.**

WEEK ENDING	MILLION HEAD SLAUGHTERED	MILLION HEAD AVAILABLE	PCT	AVG WT
JUNE	7	157.8	159.0	99%
	14	160.7	161.3	100%
	21	161.7	161.0	100%
	28	167.3	160.4	104%
JULY	5	145.3	160.9	90%
	12	161.8	160.4	101%
YEAR TO DATE	4304.4	4364.8	99%	
JULY	19	160.8		
	26	162.6		

BROILER/CATTLE/HOG WEEKLY ESTIMATED SLAUGHTER

	-----THOUSANDS-----				
W/E	07/19/03	07/12/03	% CHG	07/20/02	% CHG
Broilers	156,146	159,849*	-02	159*974	-02
Cattle	746	743	0	710*	+05
Hogs	1,828	1,789	+02	1,813*	+01

Under Federal Inspection

*ACTUAL

NATIONAL CANNER FOWL MARKET Majority prices were unchanged on both light and heavy cannery when compared to a week earlier. Demand was fair to moderate for the light but sufficient offerings. The undertone was seasonal but generally steady.

CENTS PER POUND, CURRENT NEGOTIATIONS, WITHOUT FREIGHT COST

LIGHT CANNER HENS**(LINE RUN WITHOUT NECKS)**

20-25 MAJORITY 23-24

HEAVY CANNER HENS**(WITHOUT NECKS)**

29.5-36 MAJORITY 32.5-34

CENTS PER POUND, CURRENT NEGOTIATIONS, FREIGHT COST INCLUDED

LIGHT CANNER HENS**(LINE RUN WITHOUT NECKS)**

22-26 MAJORITY 25.5-26

HEAVY CANNER HENS**(WITHOUT NECKS)**

31-38 MAJORITY 34-36.5

LIGHT TYPE HENS

CENTS PER HEAD, GENERALLY FOR REMOVAL WITHIN THE NEXT 10 DAYS (INCLUDES HANDLING, FREIGHT AND ANY OTHER CHARGES, WEIGHTS AVERAGE ABOUT 3.50 POUNDS)

EASTERN REGION Values were unchanged when compared to a week earlier. Offerings of spent hens were at least adequate to fully adequate for current trade needs. Demand was mostly light to no better than fair. Processing schedules were normal to instances heavy. Opinions on removal cost were steady.

	RANGE	MAJORITY
REMOVAL COST	0-12	9-11

SOUTH CENTRAL LIGHT LIVE HEN Disposal costs were at levels close to last weeks values. Offerings were fully adequate, relieving a slow call for additional volume. Schedules were set for a fair interest in processed sales. Costs of salvage were expected to remain about steady.

	RANGE	MAJORITY
AT FARM PRODUCER LOADING	TOO FEW TO REPORT	

NORTH CENTRAL LIGHT LIVE HEN Values were unchanged. Demand was usually quiet with offerings continuing at least fully adequate to mostly ample. Most producers were utilizing means other than traditional processors to dispose of spent fowl, with rendering operators schedules filling quickly. Opinions of values were steady.

	RANGE	MAJORITY
REMOVAL COST	0-11	10-11

WEST COAST LIGHT LIVE HEN Plants schedules moderate. Offerings generally adequate.

HEAVY TYPE HENS (7 POUNDS AND UP) *
PRELIMINARY PRICE, CENTS PER LB., GENERALLY FOR
SLAUGHTER THE WEEK OF 21-JULY-03

SOUTHEAST HEAVY LIVE HEN Sales were too few to report prices. Demand was no better than fair for the at least adequate to fully adequate offerings. Finished product supplies were mostly about adequate and well cleared. Processing schedules for next week were normal to instances heavy. The undertone was steady.

	RANGE	MAJORITY
AT FARM BUYER LOADING	TOO FEW TO REPORT	
AT FARM PRODUCER LOADING	TOO FEW TO REPORT	
FOB PLANT	TOO FEW TO REPORT	

SOUTH CENTRAL HEAVY LIVE HEN Negotiations were too few to report. Offerings were fully adequate from production areas. Finished sales were fair. Schedules were at desired levels. Trade sentiment was about steady.

	RANGE	MAJORITY
AT FARM BUYER LOADING	TOO FEW TO REPORT	

* WEIGHTS UNDER 7 LBS. SUBJECT TO DISCOUNT.

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**USDA, AMS, POULTRY PROGRAMS,
POULTRY MARKET NEWS OFFICES**

Washington, DC	Voice	(202)720-6911	Mike Sheats
	Fax	(202)720-2403	(Chief)
Atlanta, GA	Voice	(404)562-5850	Johnny Freeman
	Fax	(404)562-5875	(Officer-In-Charge)
	Recorded	(404)562-5856	
Jackson, MS	Voice	(601)965-4662	Gary Brown
	Fax	(601)965-4661	(Southern States Area Supervisor)
Des Moines, IA	Voice	(515)284-4471	Mary L. Adkins
	Fax	(515)284-4468	(Officer-In-Charge)
	Recorded	(515)284-4545	
Bell, CA	Voice	(323)269-4154	Jim Derby
	Fax	(323)269-5926	(Officer-In-Charge)
	Recorded	(323)260-4676	